



PROJECT-SALESACHIEVER CRM

EXTENDED PROFILE

OVERVIEW

Project-SalesAchiever CRM is a software package tailored towards the construction and engineering industries.

Project-SalesAchiever CRM has been developed specifically to be used by construction companies both in the office and in the field. It allows sales staff to manage construction specific sales processes via an intuitive workflow and interface. The front end user is at the heart of the design and ease of use is an important facet.

Data loading tools are geared up towards importing data from project lead information providers such as Dodge and Reed. Another key feature is the powerful 'drag and drop' interface that allows users to add functionality to CRM tool as and when required. Project-SalesAchiever has also been designed to integrate easily with third-party ERP solutions including Avante, SAP, and Oracle.

The CRM solution can be hosted in the cloud installed on-premise and will run on any browser enabled handheld or desktop device. Project-SalesAchiever CRM pricing is flexible; firms can select either a monthly subscription, which is based on a per-user, per month structure, or pay up-front for the package.

FEATURE OVERVIEW

SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	Project-SalesAchiever CRM
SOFTWARE FEATURES	
API ACCESS	✗
CADENCE	✗
CONTACT MANAGEMENT	✓
CONTRACT MANAGEMENT	✗
DATABASE MANAGEMENT	✓
FUNNEL REPORTING	✓
INTEGRATIONS	✓
PARTNER TRACKING	✗
PERFORMANCE REPORTING	✓
PIPELINE MANAGEMENT	✓
PRODUCT & PRICE CONTROL	✓
SALES GAMIFICATION	✗
QUOTATION HANDLING	✓
TASK ASSIGNMENT	✓

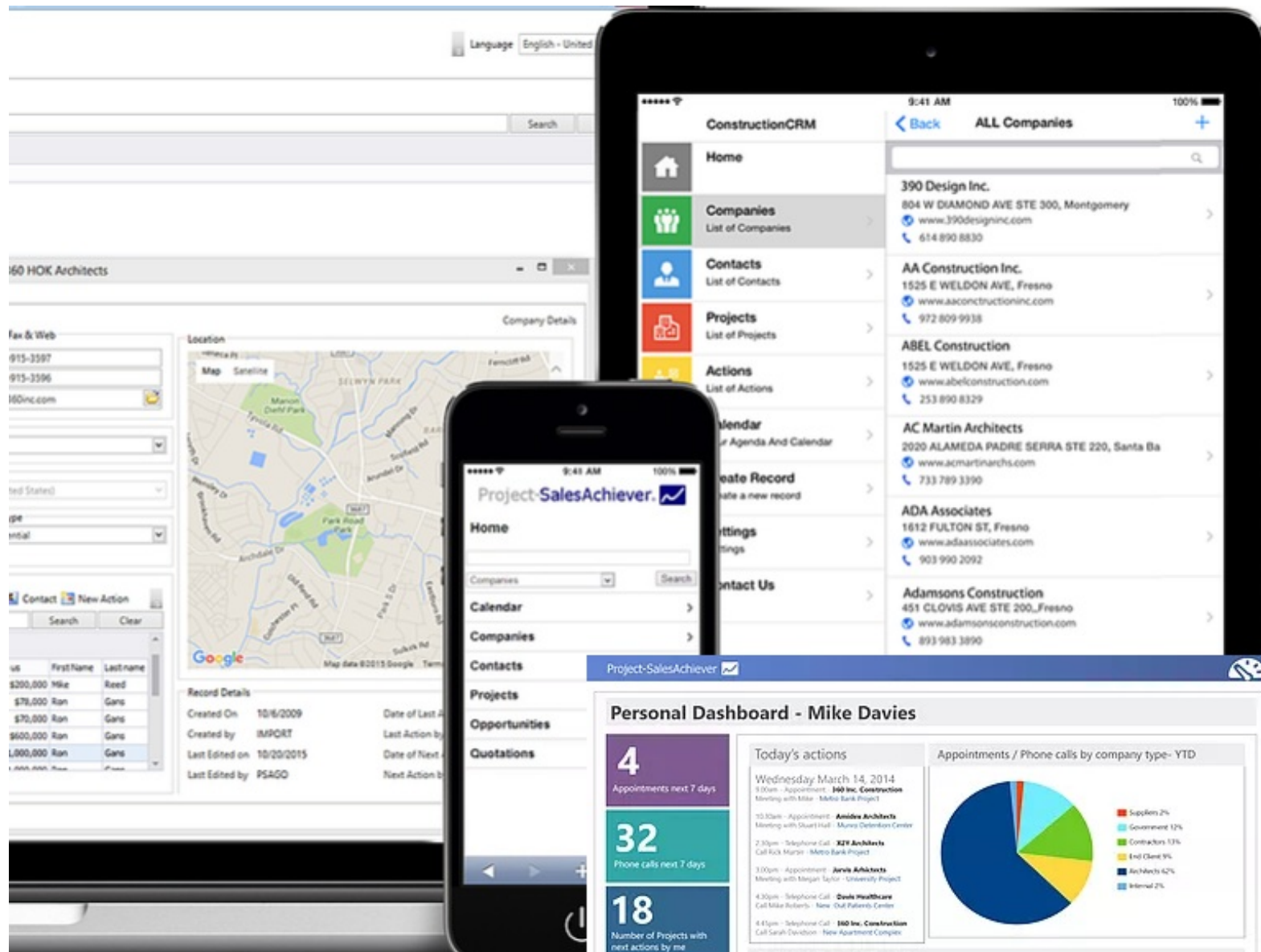
TERRITORY/QUOTA MANAGEMENT	✗
SUPPLEMENTARY FEATURES	
CPQ	✓
CUSTOMER SERVICE AUTOMATION	✗
MARKETING AUTOMATION	✗
SOCIAL RELATIONSHIP MANAGEMENT	✗
CUSTOMER SIZE	
SMALL (1-50 USERS)	✗
MEDIUM (51-200 USERS)	✓
ENTERPRISE (201+ USERS)	✓
OTHER FEATURES	
MULTIPLE LOCATIONS	✓
MULTIPLE CURRENCY	✗
CUSTOMIZABLE	✓
MOBILE FEATURES	
IOS APP	✗
ANDROID APP	✗
NATIVE WEB APP	✓
HOSTING METHOD	
CLOUD	✓

ON-PREMISE



FURTHER INFORMATION

SOFTWARE SCREENSHOTS



The image displays three devices showcasing the Project-SalesAchiever software interface:

- Desktop:** Shows a contact form for '160 HOK Architects' with fields for phone numbers, website, and location. A map of the area is visible. Below the map is a table of records.
- Tablet:** Displays the 'ConstructionCRM' mobile app. The left sidebar has icons for Home, Companies, Contacts, Projects, and Actions. The main screen shows a list of companies under 'ALL Companies'.
- Smartphone:** Shows the 'Project-SalesAchiever' mobile app. The top bar includes the app name and logo. Below is a navigation menu with Home, Calendar, Companies, Contacts, Projects, Opportunities, and Quotations. The main content area is a 'Personal Dashboard - Mike Davies' with three key metrics: 4 Appointments next 7 days, 32 Phone calls next 7 days, and 18 Number of Projects with next actions by me. It also features a 'Today's actions' list and a pie chart for 'Appointments / Phone calls by company type- YTD'.

us	First Name	Last name
\$200,000	Mike	Reed
\$70,000	Ron	Gans
\$70,000	Ron	Gans
\$600,000	Ron	Gans
1,000,000	Ron	Gans

Personal Dashboard - Mike Davies

4
Appointments next 7 days

32
Phone calls next 7 days

18
Number of Projects with next actions by me

Today's actions

- 9:00am - Appointment - **160 Inc. Construction**
Meeting with Mike - Metro Bank Project
- 10:30am - Appointment - **Amidra Architects**
Meeting with Stuart Hall - Museo Del Arte Reina Sofia
- 2:30pm - Telephone Call - **KZF Architects**
Call Rick Marjor - Metro Bank Project
- 3:00pm - Appointment - **Jervis Architects**
Meeting with Megan Taylor - University Project
- 4:30pm - Telephone Call - **Opale Healthcare**
Call Mike Roberts - New Out Patients Center
- 4:45pm - Telephone Call - **160 Inc. Construction**
Call Sarah Davidson - New Apartment Complex

Appointments / Phone calls by company type- YTD

Company Type	Percentage
Supplier	2%
Government	12%
Contractors	13%
End Client	9%
Res Merchs	62%
Internal	2%

360 HOK Architects

Overview News Information Notes Lists Actions Contacts Projects Quotes Opportunities Companies Rates Rights Reports Business

Name: 360 HOK Architects
 Telephone, Fax & Web: 1-800-915-2597, 1-800-915-2596, www.360inc.com
 Address: 6155 Park South Drive
 City: Charlotte, State: North Carolina, Zip: 28210, Country: United States
 Currency: English (United States)
 Company Type: Client - Potential

Location: Map Satellite

Projects

Project Title	Role	Site City	Selling Status	Market	Value to us	First Name	Last Name
2334 High Road - PROJECT	Architect	New York	2. Opportunity	Civil	\$350,000	Ron	Gans
ABC Cooler Project	Architect	New York City	2. Opportunity	Civil	\$200,000	Mike	Rand
ABELINE CHRISTIAN RECREA...	Architect	Abilene	Rejected	Civil	\$70,000	Ron	Gans
ALLEN CO HIGH SCHOOL PH 2	Architect	Scottsville	1. Not Qualified	Industrial	\$70,000	Ron	Gans
Apartment - Washington	Architect	Charlotte	5. Won	Civil	\$600,000	Ron	Gans
Bus High School	Architect	Tampa	5. Won	Civil	\$1,000,000	Ron	Gans

No. Of Projects: 12

Profile Re-Subscribe

Quotations and Estimates

Project-SalesAchiever - (3 Bids Submitted)

File Managers Window Tools Help Accounts Projects Opportunities Quotations Edit Mode

QuickStart

Look for:

Project Title	Estimator	Status	City	State	First Inv
3U BRISCOE QUAD RESIDENCE HALL	Estimator: David Little (4 Items)	Trading	Bloomington	Indiana	6/1/2011
FAIR ACRES GERIATRICS CENTER NO 8		Bid Submitted	Media	Pennsylvania	9/1/2011
LUC CHEMICAL SCIENCES BUILDING		Bid Submitted	Chicago	Illinois	10/1/2010
SUNNY BIOTECH RESEARCH PHASE 1		Bid Submitted	Syracuse	New York	7/1/2011
DALLAS LOGISTICS HUB COMPLEX PHASE 2	Estimator: Julian Warr (1 Items)	Bid Submitted	Dallas	Texas	8/1/2011
MONROE COUNTY JUSTICE CENTER	Estimator: Ray Christine (3 Items)	Bid Submitted	Sparta	Wisconsin	10/1/2010
SANY HEAVY INDUSTRY ASSEMBLY PLANT		Bid Submitted	Peachtree City	Georgia	10/1/2010
UNIVERSITY OF OREGON ALPINE CENTER BP 1		Bid Submitted	Eugene	Oregon	10/1/2010
BUCKEYE BUSINESS CENTER PHASE 1	Estimator: Rob Chlenski (2 Items)	Bid Submitted	Phoenix	Arizona	8/1/2011
DISTILLERY REDEVELOPMENT PHASE 1		Bid Submitted	Boston	Massachusetts	9/1/2011

Shortcuts

Create

Account Action Project Quotation Opportunity InfoSearch

Search

View Diary To do List

Quotation Details

Product Details

Product Code: Network Cabling
 Item Description: Network Cabling
 Quantity: 1000.00
 Unit Price: \$1.80
 Net Price: \$1,800.00

Cost Type	Cost	Conversion Factor	Quantity	Adjusted Cost	Line Markup %	Line Markup	Cost Markup	Line Total	Unit Price
Material	1200.00	0.00	40	4,800.00	20.00	960.00	480.00	6,240.00	6.24
Labor	750.00	0.02	20	1,500.00	0.00	0.00	112.50	1,612.50	1.61
Overhead Labor	95.00	0.02	20	1,900.00	0.00	0.00	0.00	1,900.00	1.90
Line Total Summary									
Line Discount (in figure)				0.00	0.00	%			
Markup					18.00	%			
Margin					19.62	%			
Total				9,752.50					
Line Total				9,752.50					
Total Cost				1,200.00					
Net Price									9.75

OK Cancel

360 HOK Architects

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No. Of Projects: 12

Record Details

Created On: 10/6/2009 Date of Last Action: 2/9/2015
 Created by: IMPORT Last Action by: PSAGO
 Last Edited on: 10/20/2015 Date of Next Action:
 Last Edited by: PSAGO Next Action by: MIKER

Profile Re-Subscribe